Club President's Monthly Checklist

This checklist is designed to help Rotary club presidents-elect and presidents plan and monitor club activities on a monthly basis. It also serves as a monthly reminder of activities and deadlines that apply to all Rotary clubs.

Read the entire checklist to gain an overall perspective of the next 18 months. You may wish to place a check (✓) in each box after the item has been addressed to your satisfaction. An asterisk (*) indicates a Rotary Foundation-related item. Please contact The Rotary Foundation of Rotary International for more details at: http://www.rotary.org/foundation/index.html

The Rotary events listed below do not have fixed dates. Write the dates that your club will attend the events on the lines below and then add them to the appropriate month on the blank lines provided. You can also use the blank lines in each month to add local events that are specific to your club.

District conference _____

District leadership seminar _____

District membership seminar _____

District Rotary Foundation seminar _____

Leadership development program _____

Official visit of district governor _____

Assistant governor visits _____

Club assemblies _____

Installation of club officers _____

Visit www.rotary.org, for details on programs listed or contact your Club and District Support representative with questions at:http://www.rotary.org/support/index.html.

As Club President-elect

January - Rotary Awareness Month

☐ Begin developing goals and appointing committee chairs.

☐ Begin preparing for next year's club budget and reviewing the status of continuing club projects.

☐ Register for presidents-elect training seminar (PETS)

☐ Encourage all incoming club officers and new members to attend the district assembly.

☐ Check with District Rotary Foundation Chair to determine the availability of DDF to support Ambassadorial Scholarships *

☐ Check with the District Scholarships Subcommittee Chair to determine the district deadline to submit Educational Programs applications.*

☐ Educate the club about the Ambassadorial Scholarships/Rotary Grants for University Teachers and the Rotary Centers for International Studies programs and promote them in your community. *

☐ Identify and recruit a public relations (PR) chairperson and committee for the club.

☐ Obtain Rotary Foundation contribution and recognition reports from current club leaders*

☐ Work with club board and Rotary Foundation committee to determine your club's Fund Development Goals prior to PETS*

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February - World Understanding Month

☐ Attend PETS on _____ February.

- ☐ Hold the first meeting of the board-elect.

- ☐ Register for presidents-elect training seminar (PETS).

- ☐ Encourage all incoming club officers and new members to attend the district assembly.

- ☐ Encourage PR training for the public relations committee or encourage self-training by reviewing the Public Relations section of the Rotary Web site, registering for Rotary PR Tips, e-newsletter, and ordering PR training materials.

- ☐ 23 February: Celebrate the anniversary of the founding of Rotary. Conduct a visible service project in your community.

- ☐ Obtain contribution and recognition reports from current club leaders.*

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March - Literacy Month

- ☐ Attend PETS on _____ March.

- ☐ Set the club's Fund Development goals to The Rotary Foundation, taking into account the "*Every Rotarian Every Year*" campaign and Rotary's US$200 Million Challenge*.

- ☐ Using the RI Presidential Citation as a guide, develop a well rounded plan for the year incorporating projects and activities that reflect the RI President-elect's emphases for the coming year.

- ☐ Register to use Member Access and ensure incoming Club Secretary, Club Treasurer and Club Foundation Chair have also registered (www.rotary.org/en/selfservice)

- ☐ Contact Governor-elect to confirm Group Study Exchange (GSE) pairing for the coming year. Begin promoting GSE program within the club and encourage Rotarians to recruit potential GSE team member candidates and/or consider applying for the position of GSE team leader*.

☐ Encourage the PR committee to develop a PR plan for the next Rotary year. Review the publication *Effective Public Relations* (#257) for more information

☐ Work with the current club president to ensure Best Cooperative Projects Award applications have been submitted to the governor.

☐ 30 March: Obtain and review Monthly Contribution Report (MCR) toward suggested benchmark of 65% of Annual Programs Fund goal achievement.*

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April - Magazine Month

☐ Attend the district assembly with other incoming club officers on _____ April or May.

☐ Submit your Fund Development Club Goal Report form to your District

   Governor-elect by 1 May*

☐ Ask the PR chair to finalize the PR plan for the club, and identify key local media contacts.

☐ Obtain contribution and recognition reports from current club leaders.*

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May

☐ Review the status of current club projects and how they will affect planning for the upcoming year.

☐ Review the status of current Humanitarian Grants and ensure progress/final reports have been submitted*.

☐ Hold club assembly to discuss plans made at district assembly and upcoming RI theme. Discuss goals set for membership development and giving to The Rotary Foundation.*

☐ Confer with the secretary and incoming secretary to update the RI membership database via the web, (www.rotary.org/en/selfservice), on or before 1 June, so that the July semiannual report (SAR) from Rotary International will be up-to-date and accurate.

☐ Ask the PR chair to develop a list of prospective media contacts and an outreach calendar based on the PR plan.

☐ Ask the PR chair to order PR promotional materials including *This is Rotary* (#001) and *What's Rotary* (#419) for distribution to the media as may be needed.

☐ Obtain contribution and recognition reports from current club leaders.*

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June - Rotary Fellowships Month

☐ Consult with the secretary and incoming secretary to update the RI membership database via the web, (www.rotary.org/en/selfservice), on or before 1 June, so that the July semiannual report (SAR) from Rotary International will be up-to-date and accurate.

☐ Finalize the Planning Guide for Effective Rotary Clubs (www.rotary.org/jump/862en.doc) and submit it to the district governor-elect or assistant governor before 1 July.

☐ Finalize the club budget for the coming year.

☐ Finalize Rotary Foundation contribution goals for the coming year*.

☐ Confer with the outgoing president to ensure a smooth transition.

☐ Arrange for a joint meeting of the incoming and outgoing club boards to ensure continuity**.**

☐ Ask the PR chair to promote new club officers to local media contacts☐ 1 June: Review interim Monthly Contribution Report (MCR) toward 100% of Annual Programs Fund goal achievement. Ensure that all contributions are sent in by 15 June to be credited in the current Rotary year.*

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As Club President_____

July

☐ Plan and conduct monthly board meeting.

☐ Promote attendance at the district conference.

☐ Initiate membership development programs for the year.

☐ Review current RI sponsored membership development certificate programs.

☐ Send monthly membership and attendance report to the district governor or district secretary no later than 15 days after the last meeting of the month.

☐ Contact the district governor for details on the selection procedure for the Significant Achievement Award.

☐ Plan and conduct a club assembly to discuss and adopt the year's program. Affirm goals set for the club's participation in Rotary Foundation programs*.

☐ Ensure that the semiannual report (SAR) has been received by the club secretary. Work with the secretary to complete the SAR and send with dues to RI. Submit district per capita dues, if applicable.   A past-due reminder notice will be sent on 1 October if RI dues have not yet been paid.

☐ Endorse the nomination of a club member for the Four Avenues of Service Citation for Individual Rotarians, between 1 July and 30 June. Inform the

governor. Contact the RI Programs staff for details at RIawards@Rotary.org.

☐ Request club Foundation committee and district alumni subcommittee chair to identify outstanding nominee for The Rotary Foundation Global Alumni Service to Humanity Award. *

☐ Begin submitting applications for Matching Grants. Although the deadline for submission is not until 31 March, clubs are strongly encouraged to submit their applications as early as possible during the year*

☐ Update classification roster. Prepare current list of filled and unfilled classifications.

☐ Contact the District GSE Chair to confirm deadlines for submitting GSE team member/leader applications for district GSE selections. Recruit young professionals between the ages of 25-40 and encourage qualified candidates to submit a GSE Team Member Application. *

☐ Rotary World Peace Fellowships: applications due to The Rotary Foundation from districts by 1 July.*

☐ Lead by example and encourage every Rotarian to make a personal contribution to The Rotary Foundation at the first meeting of the new year or in the month of July.*

☐ Log on to Member Access and download TRF contribution and recognition reports.*

☐ Ask the PR chair to promote the club as planned

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August - Membership and Extension Month

☐ Plan and conduct monthly board meeting.

☐ Promote attendance at the district conference.

☐ Send monthly membership and attendance report to the district governor or district secretary no later than 15 days after the last meeting of the month.

☐ Conduct club activities to support membership development and extension efforts.

☐ Promote attendance at the district membership seminar.

☐ Promote attendance at the district Rotary Foundation seminar*

☐ Induct appropriate Rotary Foundation alumni into membership in the club.*

☐ Consider nominating a club member for one of these service awards from The Rotary Foundation: District Service Award, Citation for Meritorious Service, or Distinguished Service Award. *

☐ 1 August – Deadline for submitting Competitive Matching Grant Applications for consideration at the October Trustee Meeting*

☐ Ask the PR chair to promote club as planned – including any literacy projects for 8 September, International Literacy Day.

☐ Log on to Member Access and download TRF contribution and recognition reports. This task can also be assigned to the club secretary, treasurer or club Foundation chair*

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September - New Generations Month

☐ Plan and conduct monthly board meeting.

☐ Promote attendance at the district conference.

☐ Send monthly membership and attendance report to the district governor or district secretary no later than 15 days after the last meeting of the month.

☐ Highlight and promote youth-related activities and programs and celebrate club success in Interact, Rotaract, RYLA and Youth Exchange programs.

☐ Submit a club project in need of funding, volunteers, donated goods and/or partners for a Rotary Foundation Matching Grant, or completed projects that

can be used as examples of best practices to be posted on Project LINK, RI's online searchable database.*

☐ Monitor membership development initiatives and goals.

☐ Endorse qualified GSE team members' applications and submit them to the district GSE selection committee by their deadline for consideration. *

☐ Ask the PR chair to promote club as planned – including any polio efforts for 24 October, World Polio Day.

☐ 30 September: Obtain and review Monthly Contribution Report (MCR) toward suggested benchmark of 20% of Annual Programs Fund goal achievement.*

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October - Vocational Service Month

☐ Plan and conduct monthly board meeting.

☐ Promote attendance at the district conference.

☐ Send monthly membership and attendance report to the district governor or district secretary no later than 15 days after the last meeting of the month.

☐ Conduct vocation-related activities and programs.

☐ Monitor membership development initiatives and goals.

☐ Ambassadorial Scholarships: applications due to The Rotary Foundation from districts by 1 October. *

☐ Based on the club's contributions to The Rotary Foundation, submit a timely request for Paul Harris Fellow recognition items, for presentation at a club ceremony during November, "Rotary Foundation" Month. *

☐ Ask the PR chair to promote club as planned – including any service projects that might be highlighted by local media during the upcoming holidays

☐ Continue submitting applications for Matching Grants. (Deadline is 31 March, but check with district TRF chair and Rotary's website for updated schedule information)*

☐ Log on to Member Access and download TRF contribution and recognition reports.*

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November - Rotary Foundation Month

☐ Plan and conduct monthly board meeting.

☐ Promote attendance at the district conference.

☐ Send monthly membership and attendance report to the district governor or district secretary no later than 15 days after the last meeting of the month.

☐ Consult with the secretary to update the RI membership database via the web, (www.rotary.org/en/selfservice), on or before 1 December, so that the January semiannual report (SAR) from Rotary International will be up-to-date and accurate.

☐ Conduct related activities and programs on Rotary Foundation programs, including PolioPlus, and fund development*. (e.g. Paul Harris Fellows, Paul Harris Society, Benefactors, Bequest Society members and major donors).

☐ Week including 5 November is World Interact Week. Support your local Interact club or help organize one.

☐ Monitor membership development initiatives and goals.

☐ 15 November: Deadline to submit nominations for The Rotary Foundation Distinguished Service Award. *

☐ 15 November (US clubs only): Deadline to submit IRS Form 990 (and possibly form 990-T) to U.S. Internal Revenue Service. Contact the IRS for report forms, filing limits, and other requirements (www.irs.ustreas.gov).

☐ Request club assistance in hosting the visiting Group Study Exchange (GSE) teams in the district. Forward contact information of interested Rotarian hosts to the district GSE Chair.*

☐ Inform district GSE Chair of your club's interest in having an inbound or outbound GSE team make a presentation at your club. *

☐ Nominations for The Rotary Foundation Global Alumni Service to Humanity Award must be sent to your zone's regional Rotary Foundation coordinator by 31 December. *

☐ Ask the PR chair to promote club as planned – including any health or educational projects related to 1 December, World AIDS Day.

☐ 30 November: Obtain and review Monthly Contribution Report (MCR) toward suggested benchmark of 33% of Annual Programs Fund goal achievement.*

☐ Recognize all of the club's Major Donors, Bequest Society Members, Benefactors, Paul Harris Society members, and Paul Harris Fellows with special acknowledgement during Rotary Foundation Month.*

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December - Family Month

☐ Plan and conduct monthly board meeting.

☐ Promote attendance at the district conference.

☐ Plan to send a club representative to the RI Convention. Check Rotary.org for the registration deadline

☐ Send monthly membership and attendance report to the district governor or district secretary no later than 15 days after the last meeting of the month.

- ☐ Consult with the secretary to update the RI membership database via the Web, (www.rotary.org/en/selfservice) on or before 1 December, so that the January semiannual report (SAR) from Rotary International will be up-to-date and accurate.

- ☐ Assess the progress of club projects and provide progress reports for Humanitarian Grants as required by the Foundation.*

- ☐ Conduct activities to demonstrate your club's commitment to family and community.

- ☐ Hold annual club election no later than 31 December.

- ☐ 31 December: Deadline for reporting next year's club president and secretary to RI for the Official Directory (007-EN), and to the district governor-elect.

- ☐ Monitor membership development initiatives and goals.

- ☐ 15 December – New deadline for submitting Competitive Matching Grant Applications for consideration at the April Trustee Meeting*

- ☐ 15 December: Encourage members to make TRF contributions prior to this date in order to receive (USA) tax receipts.*

- ☐ Ensure that all contributions to be counted within the calendar year are received at The Rotary Foundation before 31 December*.

- ☐ Ask the PR chair to promote club as planned – including any family or service projects related to the holidays.

- ☐ 30 December: Obtain and review Monthly Contribution Report (MCR) toward suggested benchmark of 50% of Annual Programs Fund goal achievement.*

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January - Rotary Awareness Month

- ☐ Plan and conduct monthly board meeting.

- ☐ Promote attendance at the district conference.

- ☐ Send monthly membership and attendance report to the district governor or district secretary no later than 15 days after the last meeting of the month.

- ☐ Conduct activities and programs to provide members with continuing education on RI and to publicize Rotary to the community.

- ☐ Verify with the club secretary that the January semiannual report (SAR) has been received. Work with the club secretary to complete the SAR and send with dues to RI. Submit district per capita dues, if applicable. A past-due reminder notice will be sent on 1 April if RI dues have not yet been paid.

- ☐ Monitor membership development initiatives and goals.

- ☐ Conduct a semiannual checkup on all committee activities and objectives.

- ☐ Plan and conduct club assembly to review progress toward all club goals.

- ☐ Promote availability of Ambassadorial Scholarships locally. Check with district scholarships subcommittee chair on deadline for clubs to submit applications for the district-level competition. *

- ☐ Promote availability of world-competitive Rotary World Peace Fellowships. Check with district Rotary World Peace Fellowships chair on deadline for clubs to submit applications for the district-level competition. *

- ☐ Ask the PR chair to promote club as planned – including Rotary's anniversary on 23 February

- ☐ Follow-up with the district governor to confirm any district celebration plans.

- ☐ Remind club members about upcoming 31 March deadline for submitting applications for Matching Grants.*

- ☐ Log on to Member Access and download TRF contribution and recognition reports.*

- ☐ Work with club board, Foundation committee and club president-elect to determine Fund Development Club Goals prior to PETS.

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February - World Understanding Month

☐   Plan and conduct monthly board meeting.

☐   Promote attendance at the district conference.

☐   Send monthly membership and attendance report to the district governor or district secretary no later than 15 days after the last meeting of the month.

☐   Conduct club activities to promote world understanding and peace.

☐   23 February (Rotary's anniversary) is World Understanding and Peace Day. Conduct activities that emphasize Rotary's commitment to international understanding, friendship, and peace.

☐   Promote Benefactor program as a way to build a brighter future for TRF's programs on Rotary's birthday.*

☐   Ask the PR chair to promote water and environmental projects for 22 March, World Water Day.*

☐   Monitor membership development initiatives and goals.

☐   Ask the PR chair to promote club as planned – including water and environmental projects for 22 March, World Water Day.

☐   Promote attendance at the RI Convention.

☐   Log on to Member Access and download TRF contribution and recognition reports.*

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March - Literacy Month

☐   Plan and conduct monthly board meeting.

☐   Promote attendance at the district conference.

- ☐ Conduct literacy related activities and programs.

- ☐ Send monthly membership and attendance report to the district governor or district secretary no later than 15 days after the last meeting of the month.

- ☐ Week including 13 March is World Rotaract Week. Conduct activities in support of your local Rotaract club or help organize one.

- ☐ Monitor membership development initiatives and goals.

- ☐ 15 March: Deadline for governors to submit one club nomination for RI's Significant Achievement Award. Contact the district governor for details.

- ☐ 15 March: Deadline to submit RI Best Cooperative Projects Award applications to the district governor

- ☐ 31 March: Last day to submit a Matching Grant application for funding consideration in the current Rotary year. *

- ☐ 31 March: deadline to submit completed Presidential Citation questionnaire (900) to district governor (do not send questionnaire to RI)

- ☐ If GSE team member sponsored by club was selected for outbound GSE team, invite the candidate to Rotary club meetings as part of orientation and to speak at club*.

- ☐ Ask the PR chair to promote club as planned – including environmental or sustainable development projects for 22 April, Earth Day.

- ☐ Encourage PR training for incoming PR committee or ask current PR chair to train them, introducing RI resources such as Effective Public Relations (#257), the RI Web site and PR Tips e-newsletter, to the committee.

- ☐ Clubs conduct the interview and selection process for the Rotary World Peace Fellowship and submit their club-endorsed Fellowship applications to the district in accordance with the district deadline.*

- ☐ Clubs begin conducting the interview and selection process for Ambassadorial Scholarships and submit their club-endorsed applications to the district in accordance with district deadline.*

- ☐ 30 March: Obtain and review Monthly Contribution Report (MCR) toward suggested benchmark of 65% of Annual Programs Fund goal achievement.*

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April - Magazine Month

☐   Plan and conduct monthly board meeting.

☐   Promote attendance at the district conference.

☐   Send monthly membership and attendance report to the district governor or district secretary no later than 15 days after the last meeting of the month.

☐   Conduct a club program on THE ROTARIAN or a Rotary regional magazine.

☐   Consider a nominee for The Rotary Foundation Citation for Meritorious Service; nominations received after 15 May will be returned to the nominator. Contact your district governor for details. *

☐   Monitor membership development initiatives and goals.

☐   1 April: Deadline for clubs to submit detailed explanation of their membership development strategy, initiative, or program to their district governor for consideration of a Membership Development Initiative (MDI) award.

☐   Ask the PR chair to share PR plan with incoming committee, including media contact list; offer ongoing training as needed.

☐   Log on to Member Access and download TRF contribution and recognition reports.*

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May

☐   Plan and conduct monthly board meeting.

☐ Promote attendance at the district conference.

☐ Send monthly membership and attendance report to the district governor or district secretary no later than 15 days after the last meeting of the month.

☐ Monitor membership development initiatives and goals.

☐ Review the status of current Humanitarian Grants and ensure progress/final reports have been submitted*.

☐ 15 May: Deadline to submit nominations for The Rotary Foundation Citation for Meritorious Service. *

☐ Invite returning GSE team members to speak at club about their recent GSE experience. Invite qualified GSE alumni to consider membership in your club*.

☐ Ask the PR chair to promote club as planned – including any local or global community service projects

☐ Log on to Member Access and download TRF contribution and recognition reports.*

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June - Rotary Fellowships Month

☐ 1 June: Review interim Monthly Contribution Report (MCR) toward 100% of Annual Programs Fund goal achievement. Ensure that all contributions are sent in by 15 June to be credited in the current Rotary year.*

☐ Arrange for a joint meeting of the incoming and outgoing boards to ensure continuity.

☐ Submit final Rotary year contributions to The Rotary Foundation before 30 June*.

☐ Promote attendance at the district conference.

- ☐ Send monthly membership and attendance report to the district governor or district secretary no later than 15 days after the last meeting of the month.

- ☐ Promote club members' participation in Rotary Fellowships.

- ☐ Send club representatives to the RI Convention.

- ☐ Prepare a year-end audit of the club's financial transactions, working with club secretary and treasurer. Submit a financial statement to the club about its fiscal status.

- ☐ Prepare a status update for the club on its Rotary Foundation goal achievements and program participation*.

- ☐ Monitor membership development initiatives and goals. Provide the club with a final report on membership growth and identify areas requiring continued action.

- ☐ Confer with the president-elect to ensure a smooth transition.

- ☐ Assess all Humanitarian Grants activity and provide progress or final reports to The Rotary Foundation for all open grant projects. *

- ☐ If club sponsored a GSE team member candidate, ensure that the candidate has submitted a final report to the GSE district chair. Continue to involve GSE alumni in club activities*.

- ☐ Rotary World Peace Fellowships: applications due to The Rotary Foundation from districts by 1 July*.

- ☐ Plan a dignified ceremony for the installation of next year's club officers. Recognize and thank donors for their support for The Rotary Foundation.

- ☐ Highlight any media coverage received and thank the PR committee for their outreach efforts.

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